

Initial Face-to-Face Contacts

Note: In order to create an initial face-to-face contact, an assignment to the case is not needed.

Introduction

The following guide walks through multiple ways of creating an Initial Face-to-Face Contact for Assessment, and how to create an Initial Face-to-Face Contact for Ongoing.

Assessment Face-to-Face Contacts

Note: In order to create an Assessment Face-to-Face Contact, there must be a pending Assessment for the case. There are three ways to create an Assessment Face-to-Face Contact: the Create Case Work page, the Actions hyperlink next to the case, and the Assessment page.

1. To create an Assessment Initial Face-to-Face Contact via the Create Case Work page, select Create > Case Work > Assessment > Initial Face-to-Face Contact. Select the case and the participant(s) and click 'Create.' This will open the Case Notes page.

Create Case Work - Windows Internet Explorer

eWiSACWIS Print Spell Check Help

Create Case Items

- Administration
- Adoption
- Agreements/Notices
- Assessment
 - Initial Face-to-Face Contact
- Case/Perm Plan
- Education
- Eligibility
- ICPC
- ICWA
- Imaging
- Legal
- Narrative
- Payment
- Permanency Consult
- Placement/Services
- Planning
- Safety Assessment
- Safety Services
- Strengths and Needs

Cases

- Jones, Sally (9222753)
- Joseph, Jenny (9220005)
- Joyner, Trevor (9222751)
- juvenilereport, juvenilereport (9222365)
- Kellogg, Andy (9222422)
- Kellogg, Cale (9222421)
- Kellogg, Kathy B. (9222251)
- Kellogg, PermPlanCPC (9222461)
- Kid, Test (9222389)
- King, Kitty (9222658)
- Kinship, Vol (9222235)
- Kristina, Sandwich (9221586)

Case Participants

Hold down the 'Ctrl' key for multi-selection

- Dirk Jones, Present Spouse (9226083)
- Tommy Jones, Biological Child (9226084)
- Mary Jones, Biological Child (9226085)
- Sally Jones, Reference Person (9226086)

Create Close

Done Local intranet | Protected Mode: Off 100%

2. On the Case Notes page, enter the date the contact occurred in the Date field. The Category and Type will pre-fill. Enter the Face-to-Face Location, Face-to-Face Result, and the Narrative. Use the Search hyperlink to search out the Worker Making Contact if that is different than the Worker Creating Note. In the Participants group box, you can change the selected participants by clicking on the desired names. Use the 'Ctrl' key to select more than one participant. Click the Add Contacts hyperlink to add them to the Assessment Contact Information group box, shown on the next page.

Note: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

The screenshot shows a web browser window titled "Case Notes - Windows Internet Explorer" displaying the "eWiSACWIS" application. The page has a purple header bar with the application name and navigation links: "Print", "Spell Check", "ABC", and "Help".

At the top, the following information is displayed:

- Case: Jones, Sally (9222753)
- Worker Creating Note: Cake, Caitlin M.
- Worker Making Contact: Cake, Caitlin M. [Search](#)
- Case Note ID: 9223452
- Date Entered: 02/06/2012 02:22 PM
- ☐ Note Finalized
- ☐ Contact By Designee

The main form is divided into two sections:

Note Information

- Date: 02/06/2012
- Category: Initial Assess Contact
- Begin Time: 01:00 AM
- End Time: 00:00 AM
- Duration: 0000.0
- ☐ Billable
- Type: Initial Face-to-Face
- Type Detail:
- Face-to-Face Location: Home Visit
- Face-to-Face Result: Occurred
- ☐ View Inactive Participants
- Participants: A list of names including Jones, Dirk (Present Spouse), Jones, Mary (Bio Child), Jones, Robert (Bio Child), Jones, Sally (Reference Person) (highlighted), Jones, Tammy (Bio Child), and Jones, Tommy (Bio Child).
- Below the list: Hold down the 'Ctrl' key for multi-selection and an [Add Contacts](#) link.

Narrative

- Case Note 1/1 [Details](#)
- A large text area with the placeholder "Enter narrative text here..."
- Below the text area: [More...](#), [Less...](#), and [Default](#) links.

At the bottom of the form, there is an "Options:" dropdown menu with a "Go" button, and a row of buttons: "Insert Correction Note", "Clear Fields", "Create", "Save", and "Close".

The browser's status bar at the very bottom shows "Done", a green checkmark icon, "Trusted sites | Protected Mode: Off", and a zoom level of "100%".

- The participants selected in the Participants group box at the top of the page pre-fill in the Assessment Contact Information group box. To add participants not listed in the Participants box above, click the Insert button. The Begin Date is the date and time the Assessment this note is being linked to was created.

Case Notes - Windows Internet Explorer

eWiSACWIS Print Spell Check Help

hold down the Ctrl key for multi-selection
[Add Contacts](#)

Narrative

Case Note 1/1 [Details](#)

Enter narrative text here...

[More...](#) [Less...](#) [Default](#)

Assessment Contact Information

Assessment Contact Information

Begin Date: 02/03/2012 12:25 PM

Name	Affiliation	Title	Contact Date	
Jones, Sally			02/06/2012 01:00 AM PM	Delete
Jones, Tommy			02/06/2012 01:00 AM PM	Delete

[Insert](#)

Options: [Go](#) [Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

Done Trusted sites Protected Mode: Off 100%

- Click the Save button to save the page, then click the Close button.

5. To create an Assessment Initial Face-to-Face Contact via the Assessment page, access the pending Assessment from your desktop. This will open the Assessment page.

eWiSACWIS

Case Work Provider Work Search Refresh

Create Maintain Utilities Adoption Search Help

Dan Daisy's Desktop

☒ Date Restricted ☐ Participant View ☐ View Not Approved/Cancelled

Ticklers

Cases (32)

Harrison, Jenny (9221025) Actions
CPS Family - Ongoing 03/26/2003 Daisy, Dan Milwaukee-Admin 360 Circle Street, Milwaukee, WI 53212

Jones, Sally (9222753) Actions
CPS Family - Initial Assessment 02/06/2012 Daisy, Dan Milwaukee-Region 2 123 Main Street, Waldo, WI 53093

Access Reports

Assessment

Assessment Pending 02/06/2012

Assets and Income

Assignment

Related People

Click to Maintain Assessment

6. On the Assessment page, click on the Results tab. In the Initial Face-to-Face Contact Information group box, click on the Create Initial Face-to-Face Contact Note hyperlink. This will open the Case Note page.

Assessment - Windows Internet Explorer

eWiSACWIS

TM Print Spell Check ABC Help ?

Assessment

Name: Jones, Sally Assessment ID: 9222036 Status: Open

Report

Response Time: Within 5 business days Date: 02/03/2012

Participants Basic Allegations Contacts Results

Assessment Results

Result: **Substantiated**

Disposition

Initial Face-to-Face Contact Information

Initial Face-to-Face Must Occur By: 02/10/2012 12:25 PM [CPS Report 9238179](#) [Create Initial Face-to-Face Contact Note](#)

Initial Face-to-Face Documented:

Family RA Future A/N

Abuse Score:
Neglect Score:
Risk Level:

Safety Assessment

Safety Decision: Unsafe

Strengths and Needs

Needs Level:

Options: Go Save Close

Done Trusted sites | Protected Mode: Off 100%

7. On the Case Notes page, enter the date the contact occurred in the Date field. The Category and Type will pre-fill. Enter the Face-to-Face Location, Face-to-Face Result, and the Narrative. Use the Search hyperlink to search out the Worker Making Contact if that is different than the Worker Creating Note. In the Participants group box, you can change the selected participants by clicking on the desired names. Use the 'Ctrl' key to select more than one participant. Click the Add Contacts hyperlink to add them to the Assessment Contact Information group box, shown on the next page.

Note: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

Case Notes -- Webpage Dialog

eWiSACWIS Print Spell Check ABC Help

Case: Jones, Sally (9222753) Worker Creating Note: Cake, Caitlin M. Worker Making Contact: Cake, Caitlin M. [Search](#)

Case Note ID: 9223452 Date Entered: 02/06/2012 02:22 PM ☐ Note Finalized ☐ Contact By Designee

Note Information

Date: 02/06/2012 Category: Initial Assess Contact ☐ View Inactive Participants

Begin Time: 01:00 AM PM Type: Initial Face-to-Face

End Time: 00:00 AM PM Type Detail:

Duration: 0000.0 Face-to-Face Location: Home Visit

☐ Billable Face-to-Face Result: Occurred

Participants:

- Jones, Dirk (Present Spouse)
- Jones, Mary (Bio Child)
- Jones, Robert (Bio Child)
- Jones, Sally (Reference Person)
- Jones, Tammy (Bio Child)
- Jones, Tommy (Bio Child)

Hold down the 'Ctrl' key for multi-selection
[Add Contacts](#)

Narrative

Case Note 1/1 [Details](#)

Enter narrative text here...

[More...](#) [Less...](#) [Default](#)

Options: [Go](#)

[Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

8. Click the Add Contacts hyperlink found beneath the Participants box to populate the participants selected in the Participants group box at the top of the page to the Assessment Contact Information group box. To add participants not listed in the Participants box above, click the Insert button. The Begin Date is the date and time the Assessment this note is being linked to was created.

Case Notes - Windows Internet Explorer

eWiSACWIS Print Spell Check Help

hold down the Ctrl key for multi-selection
[Add Contacts](#)

Narrative
Case Note 1/1 [Details](#)
Enter narrative text here...
[More...](#) [Less...](#) [Default](#)

Assessment Contact Information

Assessment Contact Information
Begin Date: 02/03/2012 12:25 PM

Name	Affiliation	Title	Contact Date	
Jones, Sally			02/06/2012 01:00 <input type="radio"/> AM <input checked="" type="radio"/> PM	Delete
Jones, Tommy			02/06/2012 01:00 <input type="radio"/> AM <input checked="" type="radio"/> PM	Delete

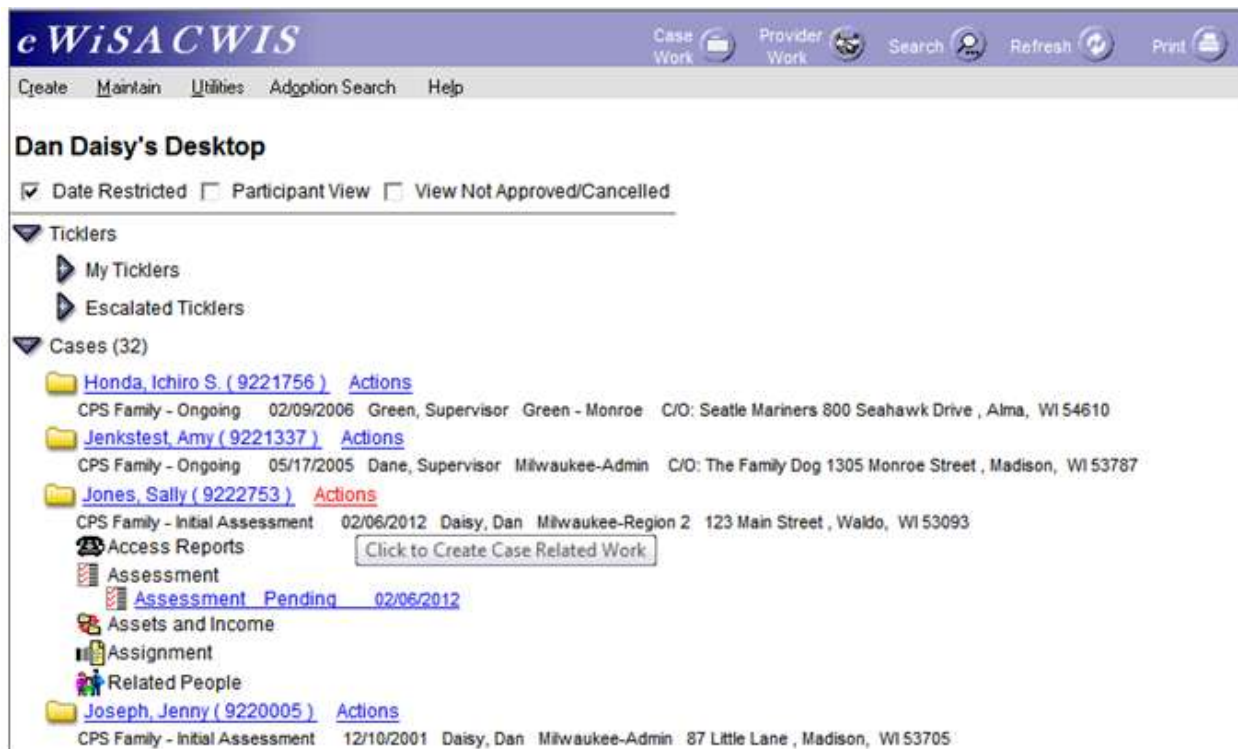
[Insert](#)

Options: [Go](#) [Insert Correction Note](#) [Clear Fields](#) [Create](#) [Save](#) [Close](#)

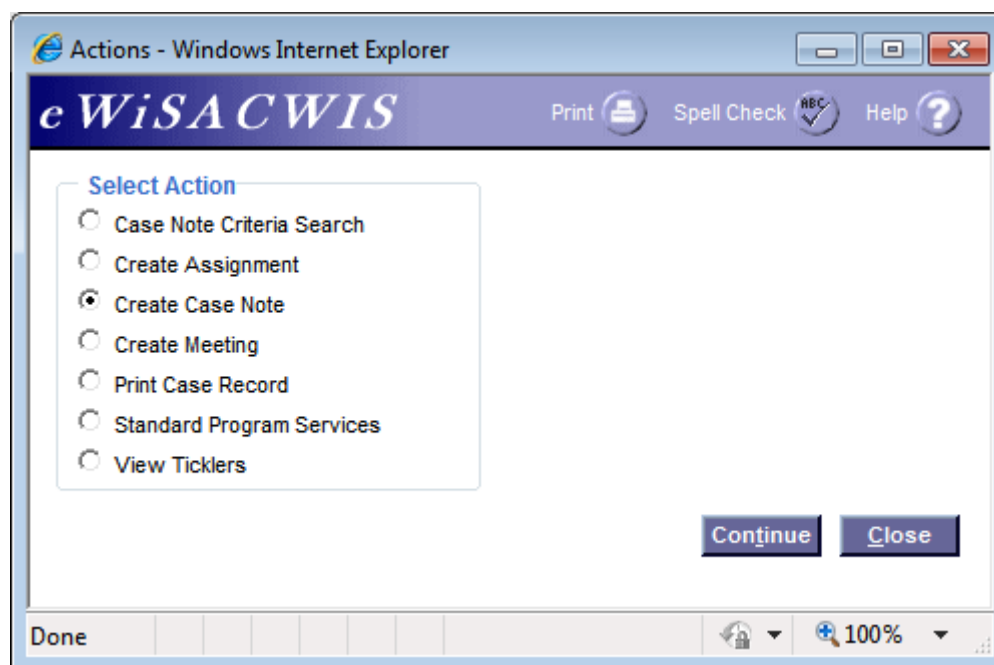
Done Trusted sites | Protected Mode: Off 100%

9. Click the Save button to save the page, then click the Close button.

10. To create an Assessment Initial Face-to-Face Contact via the Actions hyperlink, click on the Actions hyperlink next to the case on your desktop (or from Search, where a case assignment is not needed) which has the pending Assessment. This will open the Actions page.



11. On the Actions page, select the Create Case Note radio button and click Continue.



Ongoing Face-to-Face Contacts

1. To create an Ongoing Initial Face-to-Face Contact, select Create > Case Work > Narrative > Ongoing Services. Select the case and participant(s), and click Create. This will open the Case Notes page.

The screenshot shows the eWiSACWIS web application running in a Windows Internet Explorer browser. The title bar reads "Create Case Work - Windows Internet Explorer". The application header includes the "eWiSACWIS" logo and navigation links for "Print", "Spell Check", "ABC", and "Help".

The main content area is divided into two sections:

- Create Case Items:** A list of categories with dropdown menus for selection. The "Narrative" category is expanded, showing "Ongoing Services" as the selected option.
- Cases:** A list of case entries with names and IDs. The first entry, "Jones, Sally (9222753)", is highlighted.
- Case Participants:** A list of participants with names and IDs. The first entry, "Dirk Jones, Present Spouse (9226083)", is highlighted.

At the bottom right of the main content area, there are "Create" and "Close" buttons. The status bar at the bottom indicates "Done", "Local intranet | Protected Mode: Off", and a zoom level of "100%".

- The Case Notes page opens. Enter the date the contact occurred in the Date field, select Initial Face-to-Face Contact for the Type, enter the Face-to-Face Location, and Face-to-Face Result. Finally, enter the Narrative.

Note: Per policy agencies may use other professional staff as designees to complete face-to-face contacts. Staff includes those trained to assess safety, facilitate permanence, ensure a child's well-being, and evaluate the progress of a child and family's case. To indicate a Case Note completed by a designee, select the Contact by Designee checkbox.

The screenshot shows the 'eWiSACWIS' Case Notes form within a Windows Internet Explorer browser window. The form is titled 'Case Notes - Windows Internet Explorer' and has a header bar with the 'eWiSACWIS' logo and navigation links: Print, Spell Check, and Help. The main content area is divided into several sections:

- Case Information:** Case: Jones, Sally (9222753); Worker Creating Note: Cake, Caitlin M.; Worker Making Contact: Cake, Caitlin M. [Search](#)
- Case Note ID:** Case Note ID: ; Date Entered: 12/12/2012 02:48 PM; ☐ Note Finalized; ☐ Contact By Designee
- Note Information:**
 - Date: 12/11/2012
 - Begin Time: 09:30 AM
 - End Time: 00:00 AM
 - Duration: 0000.0
 - ☐ Billable
 - Category: Ongoing Services
 - Type: Initial Face-to-Face
 - Type Detail:
 - Face-to-Face Location: School / Work
 - Face-to-Face Result: Occurred
 - ☐ View Inactive Participants
 - Participants: Jones, Dirk (Present Spouse), Jones, Mary (Bio Child), Jones, Robert (Bio Child), Jones, Sally (Reference Person), Jones, Tammy (Bio Child), **Jones, Tommy (Bio Child)**
- Narrative:** Case Note 1/1 [Details](#)
enter case note narrative here...
[More...](#) [Less...](#) [Default](#)

At the bottom of the form, there are five buttons: [Insert Correction Note](#), [Clear Fields](#), [Create](#), [Save](#), and [Close](#). The browser's status bar at the bottom shows 'Done', 'Trusted sites', 'Protected Mode: Off', and a zoom level of 100%.

- Click the Save button to save the page, then click the Close button.